

ASSIGN TPA ROLE

Introduction

This section of the document will explain how an authorized TPA can self-assign the roles - 'Wage Detail - Update/Submit' and 'Payments - Update/Submit' in order to perform corresponding functions on behalf of an employer. In order for TPA (s) to self assign these roles, they must be pre-authorized by the DUA.

Step-by-Step Instructions:

1. Navigate to the TPA home page. If required, please refer to the section 'Logging In'. The following page will appear.

Change Password Logoff	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 100 TPA Name: XXXX
Assign TPA Role	TPA Home
Employment and Wage Detail Reporting	TPA Home TPA Home
Payment Information	
Searches	
User Maintenance	
	<div> Account Maintenance View or update TPA account information such as; Name, Organization Type, addresses and phone numbers. </div> <div> Employment and Wage Detail Reporting Submit Employment and Wage Detail files for multiple or individual employer accounts (adjustments and original reports), or view employment and wage detail report information for TPA submissions and client groups. To manage Employment and Wage Detail Reports for individual employer accounts, this includes 'Copy from Previous' or 'Manual' submissions, navigate to the Employer's account via the 'Searches' function. </div> <div> Searches Search for employers for which the TPA has been assigned account access. </div> <div> Assign TPA Role Submit client(s) for assignment of employment and wage detail and payment roles </div> <div> Payment Information Make payments for multiple or individual employer accounts or view payment information for agent submissions and client groups. To manage individual employer accounts, navigate to the employer's account via the 'Searches' function. </div> <div> User Maintenance Create new or update existing TPA user information </div>

2. Click on the link 'Assign TPA Role'. This link will be available only if your account has been authorized by the DUA for self – assigning roles.
3. The following page will appear. If you wish to assign roles manually using the online method, enter your choice using the radio buttons and continue to the next step. Otherwise, proceed to step 6 for instructions to use the file upload method.

NOTE: The 'Online' method allows only one employer account to be associated with the TPA account at a time. To add more than one employer, the process should be repeated. The 'File Upload' method allows more than one employer to be added at a time.

Change Password Logoff	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 100 TPA Name: XXXX
Assign TPA Role	Select Role Assignment Method
Employment and Wage Detail Reporting	Select the method in which you would like to create or modify your roles for an employer.
Payment Information	<input checked="" type="radio"/> Online
Searches	<input type="radio"/> File upload [®]
User Maintenance	<input type="button" value="Next"/>

4. The following page will appear. Enter the employer account number and click 'Next'.

[Change Password](#) | [Logoff](#)

[TPA Home](#)
[Account Maintenance](#)
[Assign TPA Role](#)
[Employment and Wage Detail Reporting](#)
[Payment Information](#)
[Searches](#)
[User Maintenance](#)

Third Party Administrator

TPA ID: 100 TPA Name: XXXX

Select Role Assignment Method

Enter the Employer Account Number to identify the Employer for which you would like to create roles for

Employer Account Number:

* Indicates Required Field

5. The following page will appear. Enter the required information and click on 'Submit' to continue.

[Change Password](#) | [Logoff](#)

[TPA Home](#)
[Account Maintenance](#)
[Assign TPA Role](#)
[Employment and Wage Detail Reporting](#)
[Payment Information](#)
[Searches](#)
[User Maintenance](#)

Third Party Administrator

TPA ID: 100 TPA Name: XXXX

Employer

Employer Account Number: 100

Employer Name: 052808

Assigned Roles

Employment and Wage Detail Update and Submit

Payments Update and Submit

Enter Service Dates

TPA Service Begin Date:

TPA Service End Date:

Select All Employer Reporting Units

☐ Check this box if the role being assigned is for all reporting units. If this checkbox is selected, the assigned role will apply to all new Employer reporting units. Otherwise, roles will need to be assigned after the new Employer reporting unit is created.

Assigned Employer Reporting Units

No records found...

Unassigned Employer Reporting Units

Add	Reporting Unit Number	Physical Address
<input type="checkbox"/>	0000	BEACON ST., BOSTON

The 'assigned roles' are displayed here.

Click here to apply the assigned roles to all reporting units

Click here to apply the assigned roles to this reporting unit.

6. A confirmation will appear on the next page indicating the role assignment process is complete.

7. Continued from step 3: Choose 'File Upload' using the radio buttons.

[Change Password](#) | [Logoff](#)

[TPA Home](#)
[Account Maintenance](#)
[Assign TPA Role](#)
[Employment and Wage Detail Reporting](#)
[Payment Information](#)
[Searches](#)
[User Maintenance](#)

Third Party Administrator

TPA ID: 100 TPA Name: XXXX

Select Role Assignment Method

Select the method in which you would like to create or modify your roles for an employer.

☒ Online
 ☐ File upload

NOTE: File Format Instructions

Upload a .txt file with the following data to assign employment and wage detail and payment to you on behalf of your client(s): The file should like below:



- The first row of the file should contain the TPA ID (Max 9 characters)
- The second row and the subsequent rows should contain the employer details in the following order:

EAN (Max 8 characters), Unit Identifier (1 = All Existing and New Units, 0 = Some of the Existing Units), Reporting Unit (Leave blank if "1" entered above. If 0, only enter one reporting unit per record. If multiple units need to be assigned, submit a record for each unit), Begin Date (MMDDYYYY), End Date (MMDDYYYY)

8. The following page will appear. Locate and upload the text file containing the employer- role assignment details using the 'Browse' button. Click 'Next' to process the uploaded file.

Change Password Logoff	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 1001 TPA Name: XXXX
Assign TPA Role	Select Role Assignment File
Employment and Wage Detail	Select the appropriate file by clicking on the 'Browse' button. Once the file is selected click 'Next'.
Reporting	<input type="text"/> <input type="button" value="Browse..."/>
Payment Information	<input type="button" value="Previous"/> <input type="button" value="Next"/>
Searches	
User Maintenance	

9. The confirmation page will appear indicating that the upload process is complete.

Change Password Logoff	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 1001 TPA Name: XXXX
Assign TPA Role	Role Assignment Confirmation
Employment and Wage Detail	The role assignment was processed successfully.
Reporting	Role Assignment Message(s)
Payment Information	Role assignment made for Employer Account Number 83 effective 11/22/2009
Searches	
User Maintenance	<input type="button" value="Previous"/>